

DOCUMENT RESUME

ED 220 910

EA 014 754

TITLE Validated School Business Practices That Work. Volume III: Sharing Business Success.

INSTITUTION Association of School Business Officials of the United States and Canada, Park Ridge, IL. Research Corp.

PUB DATE 81

NOTE 20p.; Incorporates materials from previous volumes (editions). Some pages may not reproduce due to small print of portions of original document.

AVAILABLE FROM Publications Department, Research Corporation of the Association of School Business Officials of the United States and Canada, 720 Garden Street, Park Ridge, IL 60068 (Order No. 2906; \$3.25).

EDRS PRICE MF01 Plus Postage. PC Not Available from EDRS.

DESCRIPTORS Computer Oriented Programs; *Demonstration Programs; Educational Facilities; Educational Finance; Elementary Secondary Education; Program Descriptions; *Program Effectiveness; *School Administration; School Business Officials; Student Transportation; Success; Utilities; *Validated Programs

IDENTIFIERS National Diffusion Network; *Sharing Business Success Project

ABSTRACT

Seventeen validated school business practices are described in this document. The practices were selected through the Sharing Business Success (SBS) program, in which the Federal Department of Education, 41 state education agencies, and State Associations of School Business Officials cooperate to identify successful school district practices, validate them, and disseminate them through the Joint Dissemination Review Panel and the National Diffusion Network. For each of the 17 practices included, the document provides a brief title and headnote, index terms, a lengthy description, evidence for the practice's success (in terms of effectiveness, efficiency, exportability, and cost requirements), a contact person's name, and the date of validation. Among the 17 topics covered are utility and heating management, damage and loss reports, teacher interviews, investment and cash flow management, grant administration, student attendance, payroll, transportation, insurance, food and nutrition, and extracurricular activities. The names and addresses of all state SBS coordinators and of each state's certified SBS validators are attached. (RW)

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VALIDATED SCHOOL BUSINESS PRACTICES THAT WORK

Effective

Efficient

Exportable

Volume III, 1981

Association of School Business Officials
Park Ridge, Illinois

EA 014 754

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THE ASSOCIATION OF SCHOOL BUSINESS OFFICIALS OF THE UNITED STATES AND CANADA is an international professional educational organization, incorporated not for profit, and is the oldest and largest education organization in North America devoted exclusively to the improvement of school business management. Its main objectives are to encourage the wise expenditure of taxpayers' monies, and to improve efficiency in the practice of school business management.

**VALIDATED
SCHOOL BUSINESS PRACTICES
THAT WORK
VOLUME 111**



Published by the
Research Corporation of the
Association of School Business Officials
of the United States and Canada
720 Garden Street
Park Ridge, Illinois 60068
312/823-9230

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SHARING BUSINESS SUCCESS

Introduction

During this period of rising energy costs, tight budgets and legislative reappraisals, the sharing of successful educational and school business practices by identification, validation and dissemination (IVD) is a cost-effective way to increase the benefits of dollars expended. By supporting a national diffusion strategy to facilitate wide adoption, we can minimize "wheel reinventing" and accelerate the improvement of education through making alternative solutions to school problems known, available and adoptable. Ending the present widespread duplication in the development of programs and materials at State and local levels could save millions of dollars annually.

Sharing Successful School Business Practices (SBS)

U.S. Department of Education staff has been involved in the identification, validation and dissemination of successful instructional practices since 1971. More than 275 instructional practices have been approved by the Joint Dissemination Review Panel (JDRP). These practices are described in the seventh edition of Educational Programs That Work, began in 1977. The categories of school business practices include: data processing, energy conservation, pupil transportation, operation and maintenance of plant, personnel management, plant planning and construction, professional development, property management, school security and safety, purchasing and supply, school food and nutrition, and financial planning and budgeting. Chief State School Officers have endorsed the program and appointed SBS coordinators in 46 States; 105 validators, representing 34 States have been trained; 17 of the nominated school business practices located in 11 different states have been validated under IVD procedures; several additional practices are being prepared for validation.

How SBS Works

State education agencies (SEAs) in cooperation with State Associations of School Business Officials (ASBO) survey local education agencies (LEAs) to locate potentially successful school business practices. Once identified, these practices are screened by an SEA-ASBO committee. Those showing evidence of effectiveness, efficiency and exportability are then encouraged to apply for validation. LEAs submit applications to the State SBS coordinator who then arranges to have a team of three experts (validators trained by Department in an intensive two-day workshop) review the evidence of success on site. The validation team uses a common set of criteria^{1/} to determine the effectiveness, efficiency and exportability of these practices.

Once a practice meets the validation criteria, the team certifies that it has been validated and recommends for State and national adoption. The process then calls for the Chief State School Officer to endorse the practice for purposes of statewide dissemination. State Education Agencies and State and National ASBO organizations use established dissemination networks to facilitate the widespread adoption of these practices.

Department of Education Dissemination

Once a practice has been validated through the IVD process, the developing agency (SEA or LEA) is established as a demonstration site.

To receive Federal dissemination funds, the site must submit the practice for review and approval to the Joint Dissemination Review Panel (JDRP). Once the JDRP has approved the practice it will then be added to the Department publication, Educational Programs That Work. The sites then become eligible to apply for funds as developer/demonstrators in the National Diffusion Network (NDN). As of February, 1981 three (3) SBS practices had been approved by the JDRP and several others had been submitted or were in the process of being submitted to the Panel. Our goal, this year, is to have the JDRP approve 8 to 10 of the validated SBS practices, funding as many as possible through the National Diffusion Network as developer/demonstrator projects.

^{1/}Handbook for Identification, Validation and Dissemination of School Business Practice, January 1980.

Results

If a school district with an enrollment of approximately 10,000 pupils adopted 10 of the 17 validated practices, adoption costs would be approximately \$230,000; however, the net savings or increased revenues (excluding adoption costs) would be between \$750,000 and \$6,000,000 per year. A more efficient and effective school administration stands as final and substantial bonus benefit from the adoption of the validated school business practices.

This Publication

The purpose of this publication is to familiarize interested school officials with school business practices that have been determined to be effective, efficient, and exportable. The 17 of the school business practices that had been validated through February, 1981 are described here.

The Handbook for Identification, Validation, and Dissemination of School Business Practices, which describes the IVD process and which is used to validate school business practices, is available from any of the following:

- o Executive Director, Association of School Business Officials, 720 Garden St., Park Ridge, IL 60068, 312-823-9320
- o Office of Educational Support, Office of Elementary and Secondary Education, U.S. Department of Education, 400 Maryland Avenue, S.W., Washington, D.C. 20202, 202-245-7793
- o SBS Coordinators in the cooperating State education agencies.

School officials who have developed school business practices which they believe to be exemplary are urged to have them validated through the IVD process so that they may in turn be made available for adoption by other school districts across the Nation.

Sharing Business Success

Sharing Business Success (SBS) is a project jointly sponsored by the United States Department of Education and 41 participating State Departments of Education. The purpose of the program is to provide the necessary training, organizational guides and preliminary materials to identify, validate and disseminate proven and successful school business management practices on a national basis. Since the program's inception, 17 practices have been validated. Excerpts of each are presented here for the benefit of the ASBO membership.

PRACTICE: Utility Management — *A utility conservation program using an incentive system.*

Descriptors: Energy Conservation, Program Descriptions, School Buildings, Utilities, Validated Programs.

Description: The Utility Management program was developed to reduce the energy consumption of the Palm Beach County School System. The basis of this simple but highly effective plan is an incentive system in which school faculty and principals are allowed to share the utility savings by spending on their individual schools money that would otherwise have gone for utility use.

The main elements of the program, as designed and approved by the superintendent and the school board, are as follows:

1) Explanation of the planned program to administrators, with each administrative unit then suggesting conservation methods.

2) Collection and summarizing of information on past utility use and calculation of a baseline of utility use against which improvements can be measured.

3) Appointment of a utility manager to direct the program (with the position to be phased out after a maximum of three years).

4) Distribution of conservation suggestions.

5) Meetings of the utility manager with all custodians and other staff and faculty members.

6) Distribution of a monthly report to inform each school of the money it has saved.

7) Distribution of a monthly report to inform the entire school system of the total savings for that month and for the year-to-date.

Evidence of Success

• **effectiveness:** Where previous attempts to reduce utility consumption had had little effect, this program was a success, reinforcing the practice of school-based management. The Palm Beach County School System was able in seven months to redirect \$273,000, or approximately 13.4% of the utility budget, to educational and other needs. In addition, a utility usage record was developed, and awareness of utility costs and appreciation of conservation were fostered among students and staff.

• **efficiency:** During the first 14 months of operation, the project produced an estimated cost-avoidance of over \$600,000. Long-term benefits are expected but will not necessarily be visible as a new level of conservation activity is achieved. New student involvement and behavior patterns already in evidence are expected to bring additional longterm benefits. Little or no clerical help is needed to record utility usage.

• **exportability:** The need for conserving energy and saving money makes this program of potential benefit to school districts throughout the nation, and the program's simplicity makes it par-

ticularly adaptable.

• **cost requirements:** Other than the salary of the utility manager, startup costs were \$50 for utility management forms; all clerical duties were absorbed into the workload of existing personnel.

CONTACT: Don Chenicek/
School Board of Palm Beach
County/ 3323 Belvedere Road/
West Palm Beach, FL 33402/ (305)
683-0050

VALIDATION DATE: 6/78

PRACTICE: Damage, Loss, and Theft Reporting Procedure — *A system for reporting damage, loss, and theft, and the costs incurred, in public school districts.*

Descriptors: Costs, Data bases, Information Systems, Program Descriptions, School Buildings, School Vandalism, Validated Programs.

Description: The Procedure was developed in 1973 to gather and disseminate necessary information on property damage and equipment loss, due to vandalism or any other cause, in the school district. The main features are:

1) A clear, step-by-step system for paperwork and staff actions required following any incidence of damage, loss, or theft.

2) Computerized handling of information.

3) Development of a computer-stored data base.

Through this system, information on damage, loss, and theft is readily available at any time. In addition, a year-to-date summary of this information is sent periodically to the superintendent's cabinet and monthly to each school principal. (Information includes the causes of damage or loss, the names of any persons or organizations responsible, and the costs incurred to repair or replace district property.)

Evidence of Success

- **effectiveness:** 80% of principals using the system since 1973 reported it to be much more effective—informative, timely, and flexible—than the procedures used previously. The practice has also created an awareness throughout the school system of the kinds of damage occurring and their costs.

- **efficiency:** The program replaced a reporting system that provided less information while taking more hours of staff time. The school district already had a computer system, so the cost to add the program was minimal.

- **exportability:** The procedure is appropriate for large or small districts. The computer program is available to potential users but must, of course, be adapted for each school system. If computerized equipment is not available, hand tabulation can be used.

- **cost requirements:** Startup costs of \$2,560.50 and operational costs of \$305.00 were for the most part absorbed into the system.

CONTACT: John M. Romisher/ Lincoln Public Schools/ Division of Business Affairs/ Lincoln, NE 68501/ (402) 475-1081

VALIDATION DATE: 7/78

PRACTICE: Project EMPATHY/The Omaha Teacher Interview — A method of improved teacher selection using a personnel interview developed to predict a candidate's success and to appropriately place a teacher who is hired.

Descriptors: Employment Interviews, Program Descriptions, Teacher Characteristics, Teacher Selection, Validated Programs.

Description: The Omaha Teacher Interview is the result of Project EMPATHY (Emphasizing More Personalized Attitudes Toward Helping Youth), a demonstration project funded by the Nebraska Department of Education. The interview was developed over a period of three years and consists of 32 questions found to predict teacher success as defined by characteristics rated high by administrators and students. The desired characteristics fit into eight "lifestyle themes"—relationship, democratic orientation, rapport drive, empathy, student orientation, acceptance, student success, and work and professional orientation.

In addition to enabling interviewers to differentiate between those candidates likely to be successful with students and administrators and those not likely to be successful, the interview can also provide an objective profile of any teacher's strengths and weaknesses in the lifestyle themes considered. This factor can help place teachers where their strengths can best be used and can help individualize staff development programs.

Project EMPATHY makes available a 2½-day workshop in how to give and score the interview. Any administrator actively involved in personnel selection may participate at no cost other than personal expenses.

Evidence of Success

- **effectiveness:** Researchers associated with Project EMPATHY have demonstrated that the predictions of teacher success made using the Omaha Teacher Interview are more accurate than those based on a five-point rating scale previously used in the Omaha Public Schools.

- **efficiency:** With no change in cost or time spent when compared to previous methods, this technique increases the probability of selecting candidates with the desired characteristics.

- **exportability:** This method selects persons with traits most school districts desire in their teachers. It also provides a step toward a legally defensible selec-

tion procedure for school districts because interviewers are trained to score interviews with a high degree of inter-rater reliability.

- **cost requirements:** Present staff and equipment (a tape recorder) can be used, at no additional cost.

CONTACT: Vickey Thayer, Director/ Project EMPATHY/ Omaha Public Schools/ 3902 Davenport Avenue/ Omaha, NE 68131/ (402) 554-6290

VALIDATION DATE: 7/78

PRACTICE: Food and Nutrition Management Computerized Claim Processing — A computerized system for processing child-nutrition claims.

Descriptors: Federal Programs, Information Processing, Management Systems, Nutrition, Program Descriptions, Validated Programs.

Description: This program simplifies the procedures for reporting USDA claim information to the Florida Department of Education, Food and Nutrition Management Section, and at the same time increases the accuracy of reports and improves service to clients.

The Program has been in successful operation since 1975, replacing the previously used manual claims-processing system. An APL computer program is used, along with special computer claim forms that are mailed to all clients. Necessary computer services are purchased from a commercial time-sharing computer company. The system meets the requirements of state and federal auditors and has been integrated into the Florida Department of Education's overall Food and Nutrition Management information system.

Evidence of Success

- **effectiveness:** Compared to the previously used manual system, the new system has demonstrated a more rapid turnaround time between receipt of claims and reimbursement, reduction in computational error, more prompt and accurate submission of federal operational reports, and overall improvement in management of federal grant dollars. In the program's first year of operation, a net

savings to the state of \$11,040 was documented.

- **efficiency:** The program has reduced the amount of both time and money spent processing claims, with no increase in staff. Efficiency is increased by use of bank wire transfer procedures for timely payments, storage of all files and working materials in one location, use of APL language with terminal capabilities to make program changes quickly, and the ability to expand to provide for future needs.

- **exportability:** All states participating in the USDA food and nutrition reimbursement program face the same problems caused by the increasing volume and complexity of claims. This program could be easily adapted to solve those problems in different settings.

- **cost requirements:** Using current staff, startup costs in the Florida setting were \$14,550. Operational costs are estimated at \$40,883. (Additional application or adaptation of the system could be made at relatively little cost once the basic level of training and efficiency has been attained.)

CONTACT: John B. Decker/ Florida Department of Education/ Tallahassee, FL 32304/ (904) 488-7647

VALIDATION DATE: 9/78

PRACTICE: Coordinated Transportation System of Robbinsdale School District #281 — *A method of providing daily student transportation that uses electronic data processing and coordination of student census information with map systems.*

Descriptors: Census Figures, Cost Effectiveness, Electronic Data Processing, School Districts, Transportation, Validated Programs.

Description: The basis of this highly successful program is coordination in one department of district-wide student census (or location) and transportation services and effective use of electronic data processing. A computer tabulates the census data for the district's 28,000 students and then is used to aid in routing and scheduling its 94 school buses. The main elements

of the system are:

- 1) A good base map
- 2) A simple census coding structure
- 3) Permanent bus stops

In addition to efficient daily student transportation, the program provides other important benefits which include a standard, district-wide procedure for updating census information; a data base of census information that can be used for long- and short-range planning; and a map system that serves as the backbone for many functions of the school district. The coordination afforded by the system allows use of fewer buses than would be necessary if each school's administration sets its own individual bus schedules.

Evidence of Success

- **effectiveness:** Over a five-year period, the program has met its goal of effectively reducing transportation costs. The district shows an average yearly transportation cost per pupil that is substantially lower than the average yearly cost per pupil for all districts in the state. This benefit, and the others described above, have been documented both in periods of growth and declining enrollment.

- **efficiency:** The program has saved time as well as money. Two of many examples are: a reduction by 20-25 percent in time spent setting bus schedules (as compared to the system previously used); and a savings of staff time and mileage expended worth \$8,500 per year by replacement of a door-to-door census procedure with use of a student master control form.

- **exportability:** This transportation system could be used to advantage by school districts of any size in urban, suburban, or rural settings. Costs and ease of adoption would vary depending on existing staff and equipment and available computer facilities.

- **cost requirements:** The costs of administering this program were absorbed by the existing transportation department, with minimal additional costs incurred for notebooks and computer paper, as well as time on the district's computer.

CONTACT: Robert Larsen, Supervisor of Pupil Transportation and Census/ Independent School District #281/ Robbinsdale Area Schools/ 4148 Winnetka Ave. No./ Minneapolis, MN 55427/ (612) 533-2781

SBS VALIDATION DATE: 10/79

PRACTICE: The San Gabriel School Districts' Self-Insurance Authority — *An alternative to state-administered workers' compensation insurance.*

Descriptors: Consortia, Cooperative Programs, Cost Effectiveness, School Districts, Shared Services, Special Education, Student Transportation, Validated Programs.

Description: This program was initiated by seven California school districts as an alternative to participation in the increasingly expensive state workers' compensation fund. The districts formed a consortium, the San Gabriel Valley Self-Insurance Authority, to establish and operate their self-insurance program for worker compensation, which is now in its second year of operation.

The program produces substantial savings by successfully managing the three main factors that contribute to the cost of self-insurance: administration, claims resolution, and purchase of reinsurance. Most administrative services, from program implementation and management of legal cases to preparation of meeting agendas, are provided under contract by an insurance claims management firm. A three-phase loss prevention program for district employees addresses issues of safety, attitude, and claim service and attempts to foster awareness that claims are paid with district money rather than that of an impersonal insurance company. Reinsurance is purchased from a private vendor.

Evidence of Success

- **effectiveness:** During its first year of operation, the program reduced by at least 20 percent the workers' compensation insurance premium paid by consortium members. Additional benefits that

will be measurable only after the program has been in operation for several years are anticipated. These include accumulation of interest on invested reserves and a significant reduction in claims payments as a result of the loss-prevention program.

- **efficiency:** The self-insurance program has proved more efficient for member districts than the state-administered program, reducing substantially the amount paid in insurance premiums for no additional cost and with only a minimal amount of additional staff time required.

- **exportability:** This practice should be of interest to most school districts in the nation because of the magnitude of savings possible. However, self-insurance must be permitted by statute in the adopter's state, and in most cases joint powers or consortium arrangements are necessary for implementation.

- **cost requirements:** The operational cost of the self-insurance program for one year was \$1.34 per \$100 of payroll (as compared to \$1.67 per \$100 of payroll under the state workers' compensation program).

CONTACT: Gerald R. Menefee, Deputy Superintendent, Long Beach United School District, 710 Locust Ave., Long Beach, CA 90813/ (213) 436-9931

SBS VALIDATION DATE: 10/79

PRACTICE: The Medical Insurance Project — A systematic monitoring procedure for reducing the cost of employee medical insurance.

Descriptors: Cost Effectiveness, Health Insurance, School Districts, Validated Programs.

Description: This program was developed by the Cost Analysis Center of New Brunswick, New Jersey, to reduce the annual costs of employee medical insurance for school districts. Research had shown that employees generally fail to keep the district informed of changes in their personal lives that might affect insurance coverage and that this failure often results in overpayment to insurance carriers.

(For example, paying premiums on dependent children who have reached an age no longer recognized by the carrier's contract wastes money and is of no benefit to the employee because claims made on behalf of ineligible persons will not be honored.) As a remedy, the program offers a simple system to identify and reconcile discrepancies between the amount of medical insurance that is appropriate for each employee and the amount the employee actually has. The main elements are as follows:

- 1) An initial survey of district employees to obtain current information regarding age, marital status, and ages of dependents for each.

- 2) Determination of appropriate coverage for each employee based on current employee data, insurance carrier guidelines, and district policy.

- 3) A comparison between appropriate coverage and actual coverage for each employee.

- 4) Reconciliation of differences between appropriate and actual coverage by consulting with each affected employee and, with the employee's consent, notifying the insurance carrier of necessary adjustments.

- 5) Routine continuation of the procedure during each reenrollment period.

In addition to saving money, the practice is a means of protecting the employee and the district. When an employee is found to be underinsured, the employee benefits from having coverage adjusted, and the district avoids possible liability.

Evidence of Success

- **effectiveness:** The program effectively reduced medical insurance costs in all seven districts that employed it during a one-year trial. Total net cost savings, in the form of reduced medical insurance premiums, were reported as \$57,667, for an average savings of \$15.74 per employee. Long-term savings are expected but will be less dramatic from year to year as records are kept current.

- **efficiency:** The initial savings resulting from the program were

particularly significant when compared to the small cost (three person-days per district) of achieving them.

- **exportability:** This systematic procedure could help any district achieve maximum savings on medical insurance for its employees, and the program's simplicity makes it particularly adaptable. Necessary training of staff can be provided by insurance representatives and the appropriate school administrator.

- **cost requirements:** Operational costs for all seven districts for one year amounted to \$1,058, covering staff time and the survey form, and were easily absorbed because they replaced or modified an existing practice.

CONTACT: John E. Carey, Project Director/ Cost Analysis Center/ Middlesex Borough Board of Education Office/ 96 Bayard St./ New Brunswick, NJ 08901/ (201) 745-3490

SBS VALIDATION DATE: 11/79

PRACTICE: The Pupil Transportation Project — A procedure for cooperative transportation of special education students.

Descriptors: Consortia, Cooperative Programs, Cost Effectiveness, School Districts, Shared Services, Special Education, Student Transportation, Validated Programs.

Description: This program is one of several sponsored by the Cost Analysis Center, a Title IVC project of the Middlesex Borough Board of Education in cooperation with the Middlesex County Office of the New Jersey State Department of Education. The program was instituted to reduce the cost of transporting special education students for participating school districts through use of a cooperative bidding and transportation procedure, which consists mainly of the following steps:

- 1) Formation of a consortium of school districts that transport special education students to common sites, and appointment of a regional transportation coordinator.

- 2) Collection of information from the districts by the coor-

dinator regarding the characteristics of the children to be transported, special equipment and treatment required, routes and schedules, and possible transportation vendors.

3) Analysis of transportation costs anticipated for the cooperative system as compared to costs incurred by the districts when separate systems are used.

4) Decision by each member district to participate or not, based on results of the above analysis.

5) Letting of bids and awarding of contracts.

6) Supervision of joint special education transportation by the regional transportation coordinator.

Evidence of Success

- **effectiveness:** During a three-year trial in which 15 school districts participated, the project demonstrated a substantial reduction in the actual number of miles driven and in the cost per mile when compared to systems previously used by the individual districts to transport the same students. A net cost savings of \$140,000 per year was reported. In addition, most students spent less time on buses, and energy was conserved.

- **efficiency:** These significant benefits were achieved with no increase in equipment or material required and with only the addition of a regional transportation coordinator. (In many instances, the program could probably be conducted by existing staff).

- **exportability:** This program could be used to advantage in any area where school districts transport special education students to common sites.

- **cost requirements:** Operational costs for the three-year trial period amounted to \$20,600 per year, for a coordinator, clerk, office space, and office equipment.

CONTACT: John E. Carey, Project Director/ Cost Analysis Center/ Middlesex Borough Board of Education Office/ 96 Bayard St./ New Brunswick, NJ 08901/ (201) 745-3490

SBS VALIDATION DATE: 11/79

PRACTICE: Computer Controlled Electric Heating.

Descriptors: Data Processing, Energy Conservation, School Buildings, Utilities, Validated Programs, Cost Reduction.

Description: An energy saving/cost reduction program was undertaken at the North Andover High School, an all electric facility constructed in 1973. The objective was to reduce electric consumption and thus reduce costs to the school district. The project included two simultaneous actions: 1) The entire heating system (39 roof-top units) was inspected, adjusted, and repaired. This was done on a low bidder basis. 2) The system was tied into the Honeywell Building Operation Services System ("BOSS") of control. The heating system is monitored by computer at a remote computer location. Control circuits were installed which permitted remote control of the heating system over a shared telephone tie line. Temperatures are sensed and each of the seven building heating zones is controlled by the computer, which is programmed to meet a wide variety of building use needs. Also, fans are shut down automatically for a fixed portion of the day. This is a "fine tuning" of the heating system that is not possible with the traditional clock method of control.

Once established, the program consists of annual maintenance of entire heating system and a computer-based control system tied into temperature sensors and building zone controls.

Evidence of Success

- **effectiveness:** The project presented evidence that there were 39.3% and 38.2% reductions (compared to the base year) in kilowatt hour use in the first 2 years of utilizing the computer control system. Where differences in degree days are taken into account, the reductions in kilowatt hour/degree days during the heating season (October–April) are essentially the same (39.4% and 38.5%). It was the general feeling of the building users that the heat is more uniform. As a result, there are fewer complaints received by the building principal.

- **efficiency:** Savings for the 2-year period of the practice amounted to 2,930,000 KWH's or a gross savings of \$97,555.00. Subtracting the costs, this leaves a net savings of \$71,769.

- **exportability:** Three steps are essential to the practice. (1) installation of sensing devices for temperature both inside and outside the building; (2) tying in the computer system to automatically control the heating system; and (3) annual inspection, adjustment, and repair of the heating units.

- **cost requirements:** Operational costs of \$15,456; overhead costs (two years) of \$2,969; and installation cost of \$6,781.

CONTACT: Fred Rex, Assistant to the Superintendent/Office of the Superintendent/North Andover/Massachusetts 01845 (617) 682-5231.

VALIDATION DATE: 9/22/80

PRACTICE: Fund Investment Program—A school money management investment program.

Descriptors: Money Management, Interest, Trusts (Financial), Financial Services, Income, Capital, Financial Policy, Investments, Validated Programs.

Description: The Granite School District is the largest school district in the State of Utah, with approximately 93 different locations where separate funds are maintained from the central office. The purpose of this Fund Investment Program is to give an opportunity to those desirous of managing the receipts and expenditures of a school district or business to best advantage, producing additional revenues from otherwise idle funds. The following are four activities that the program undertakes in pursuit of this goal:

- 1) Investment of District funds to cover monthly expenditures;
- 2) Investment of District daily float;
- 3) Investment of school funds by the District office; and
- 4) Investment of school funds on a daily basis.

Evidence of Success

- **effectiveness:** In the year prior to the inauguration of the program, investment produced some \$695,000. During the first 9 months of the current year, over \$5 million has been earned, and the FY total is expected to exceed \$6 million.

Even discounting phenomenal increases in interest rates, and the unusual amounts of money available for purposes of investment, the practice has netted conspicuous money gains. In comparison with other districts and state agencies, the model district is obtaining a yield about 1 percent higher than average on all funds.

Additionally, the long-range benefits are expected to be even more substantial, since the bidding procedure systematically tends to force the most favorable possible bids.

- **efficiency:** Where before the funds of individual schools—supplies, budgets, student body funds, etc.—were not invested, now their annual yields range from \$40 to several thousands per year. These earnings are used directly for program enrichment in supplies, equipment, etc., and have a perceptible effect on the quality of education in the same way that the annual addition of \$4 to \$6 million does District-wide.

- **exportability:** Adopters should compare their own investment performance with that of the developer district. If the prospective adopter's average daily return on funds invested is less than .037377, then a calculation should be made of the obtained earnings differential, and if this is substantial, adoption should clearly be considered seriously.

- **cost requirements:** This practice requires about 2 hours a day from an accountant and 2 hours a day from a secretary—probably about the same staff time required by the previous, less productive, investment program.

CONTACT: Ernest Gourley, Investment Officer/Granite School District/340 East 3545 So./Salt Lake City, Utah 94115/(801) 268-8111.

VALIDATION DATE: 9/23/80

PRACTICE: Computerized Pupil Attendance Accounting/Census System.

Descriptors: Pupil Accounting, Data Processing, School Census, Validated Programs.

Description: Thirty-six (36) school districts from throughout Kentucky are utilizing the EKEDC Computerized Pupil Attendance Accounting/Census System for maintaining the state required pupil accounting/census records.

A new concept called the "Student Data Base" was established which allowed pupil accounting data and census information on a student to be stored in the same location in the computer files.

The system requires the teachers to submit only the student's absences each month. The computer, taking into account the school calendar and the student's entry date, calculates the student's attendance and membership, thus freeing the teachers to devote more time to the students.

Evidence of Success

- **effectiveness:** Over 2,000 hours of time per user-system was achieved. The effect was consistent in all reportable user-school systems over a period of two subsequent years. It was judged that the system had significant educational impact on management practices, resulted in improved accuracy of accounting, and reduced the annual per pupil cost by \$3.32. This savings multiplied by the 150,000 students in the 36 user systems is quite significant. Because no other variables were apparent which might have affected the outcomes, it is evident that these results were due to the project's intervention.

- **efficiency:** In terms of savings of time for users of the computerized EKEDC system, a positive change occurred. Summarized here for: Teachers—Savings of 58% was realized; Principals—Savings of 67% was realized; DPP's—Savings of 54% was realized. Since the reporting of attendance/census data will be a continuous process, this practice will constitute a lasting benefit to the participating districts.

- **exportability:** The exportability of this practice and ease of adoption will vary according to the capabilities

of the potential adopter. The developer district can serve as a valuable team member in many of the suggested steps of implementation. Publications and materials are available.

- **cost requirements:** Cost for operating this system in thirty-five (35) districts with 150,000 students is \$264,879.00 or \$1.77 per student.

CONTACT: Harry P. Brown, Director/Eastern Kentucky Educational Development Corp./P.O. Box 1269/925 Winchester Avenue/Ashland, Kentucky 41101/606-324-5161.

VALIDATION DATE: 9/26/80

PRACTICE: Checkless Payroll—A procedure for electronic deposit of employee earnings in the bank.

Descriptors: Money Management, Financial Services, Payroll Services, Teacher Salaries, Financial Policy, Validated Programs.

Description: This practice utilizes a system for the electronic transfer of employee salaries to the cooperating bank. The conventional method of paying employees is through writing checks, distributing them, reconciling balances, etc., in which a considerable amount of personnel time, paperwork, transportation, and postage can be expended. This practice is an exemplary attempt to achieve the same objectives but with the expenditure of a minimal amount of staff time and with virtually no paperwork and no check reconciliation, with the cooperating bank paying for the costs of postage, paperwork, and even the data processing costs.

Evidence of Success

- **effectiveness:** The savings of this program were estimated to be \$35.54 per employee per year, or a total savings of \$30,213 per year for the district. Those estimates are based on current salaries and personnel in similar schools using traditional payroll procedures. The data used for these estimates have been verified through independent fiscal audits required for public funds. Since the program has been operating over a time period in which there has not

been a change in State law, district personnel, or basic school administrative procedures, the savings achieved can be attributed to the practice.

- **efficiency:** Efficiency is demonstrated by the resulting reduction in direct payroll office staff, absorption of some direct payroll distribution costs by the host banks, and the high level of user satisfaction (school employees). Efficiency is further demonstrated by: a) a rapid and accurate payroll process; b) eliminating delays in handling individual checks in distribution process; c) eliminating problems of lost checks in the mailing process; d) reducing district business office expense of envelopes, mailing, and data processing; e) saving time in bank statement reconciliation.

- **exportability:** The following is a step-by-step process for an adopting district: 1) Make sure there is enabling State legislation; 2) Review local Governing Board Policies for authorization; 3) Review contracts with employee groups for possible constraints; 4) Enlist a cooperative "host" bank that is a member of the Federal Clearing House System; 5) Involve staff in the decisionmaking process; 6) Acquire necessary hardware and software, as needed; 7) Organize and train staff.

- **cost requirements:** This practice has very low starting costs: \$1.28 per year per staff member. A contract must be made with a bank capable of handling all necessary data processing. Contract and negotiation time will require about one week. In addition, at least one hour should be given to orienting the clerical personnel involved, in both the central office and in individual schools. No additional materials are required.

CONTACT: Keith D. Hansen, Cash County School District/2063 North 12th East/Logan, Utah 84321/(801) 752-3925.

VALIDATION DATE: 9/26/80

PRACTICE: Cashflow Projection System—A computerized method of forecasting cashflow for use in making investment and loan decisions.

Descriptors: Data Processing, Financial Services, Investment, Management Systems, Money Management, School Accounting, School Districts, Validated Programs.

Description: This computerized system was installed to assist in the making of investment increase in general fund interest earnings for the Jefferson County school system. The system provides the ability to enter forecasted and actual data and then to project the cash balance for each day of a fiscal year for four different funds. The data are updated to reflect actual transactions, and the projected cashflow balance is automatically recalculated for each day remaining in the fiscal year.

Since it was put into operation in April 1979, the system has proven to be far more effective than the informal, manual system it replaced. Financial management can now be based on the most complete and up-to-date information possible, with the data available almost instantly.

A computer terminal and computer system that will support terminal operations and provide disc availability are required. The programming language is BASIC because it is the language normally used to teach computer programming to students. The Jefferson County school district already had a BASIC instructional program, so the necessary hardware and software were available for the Cashflow Projection system at no additional cost.

Evidence of Success

- **effectiveness:** A comparison of the district's interest income for the period April through November 1979 with the same period in 1978, when manual forecasting methods were used, shows that the system has more than met the goal set for it. After adjustments for a lower revenue and higher interest rates in 1979, records show a net gain in interest earnings of \$82,243, or 14 percent, in the first 10 months of operation. The benefits of this improved method

of money management are expected to continue.

- **efficiency:** The additional revenue was generated with no increase in personnel and no new equipment required. Operation of the system was integrated into the normal activities of the office of the district treasurer with a minimum amount of training for existing staff and with use of existing computer facilities.

- **exportability:** All school districts perform some sort of cashflow analysis, and most could benefit from this formal, easy-to-use system. It relies on standard items of information collected by school districts under normal operating circumstances, and the materials and equipment required are widely available.

- **cost requirements:** Estimated annual costs are \$4,700 for personnel and materials. Costs of computer use will vary, depending on whether facilities are already available in the adopting district.

CONTACT: Charles W. Grissett, Treasurer/Jefferson County Board of Education/3332 Newburg Road/Louisville, KY 40218/(502) 456-3351.

VALIDATION DATE: 4/80
JDRP APPROVAL: 8/80

PRACTICE: Self-Insured Health Program—An alternative to commercial health insurance coverage.

Descriptors: Cost Effectiveness, Health Insurance, School Districts, Validated Programs.

Description: The Valley View School District in Illinois initiated this self-insurance program in 1977 for the purpose of providing at less cost health care services equal to those provided by a commercial carrier. The program is run by a third-party administrator, with the district's assistant superintendent for business responsible for study of the administrator's operational reports and for approval of all vouchers and claims. Substantial savings and improved service have been the result.

Evidence of Success

- **effectiveness:** Since it began, the program has provided the same

benefits as the previous insurance carrier at a cost savings of more than \$1 million, which has been put to educational use.

- **efficiency:** In addition to saving money, the program provides more personal service to employees and has reduced by three to five days the time required to process an insurance claim.

- **exportability:** Health care costs are increasing for school districts across the nation. This program should be of interest to most because of the magnitude of savings possible. After reviewing Valley View's experience, 26 other school districts already have implemented the same basic self-insurance plan.

- **cost requirements:** Operational costs in the Valley View School District are \$36,279 for 12 months. No additional costs were required for installation.

CONTACT: R.N. Strahanoski, Assistant Superintendent/Valley View School District 3650/636 Dalhart/Romeoville, IL 60441/(815) 886-2700.

SBS VALIDATION DATE: 6/80

PRACTICE: Microcomputer Application for Extracurricular Activities—A computerized accounting system.

Descriptors: Data Processing, Financial Services, Money Management, School Accounting, Validated Programs.

Description: This practice was developed by the Milan Community Junior-Senior High School in 1979 to replace a manual system of accounting used to manage the school's extracurricular fund. Since its installation, the practice has provided more financial information with reduced personnel time required when compared to the system previously used, permitting substantial savings of money.

A minimum of equipment and staff training are required for successful operation. Accounting functions are performed by a microcomputer with tape storage of information and information display on a video screen and a printout.

Expected long-term benefits include improved management anal-

ysis capabilities and additional business and instructional applications.

Evidence of Success

- **effectiveness:** Observation and a review of the accounting records show that the practice serves the purpose for which it was designed, producing a reduction in the staff time required to perform the same functions as the previously used system. In addition, the new practice is more accurate and makes available more data for use in operation and planning.

- **efficiency:** A time savings of up to 90 percent on some tasks and 72.5 percent overall was achieved with cost savings of more than \$2,000 per year.

- **exportability:** The simplicity of the practice makes it particularly suitable for export. The instruction manuals and materials and equipment required are widely available at retail suppliers. Program modifications would of course be necessary to meet the specific requirements of each adopter.

- **cost requirements:** Start-up costs include \$1,300 for purchase of microprocessing equipment, \$75 for materials, and \$1,500 for staff training. Operating costs are \$3,575 per year, as compared to \$5,600 per year for the previously used system.

CONTACT: James E. McIntosh/Milan Community School Corporation/Box 278/Milan, IN 47031/(812) 654-2365.

SBS VALIDATION DATE: 7/80

PRACTICE: Urbana School District 116 Investment Program—An investment management system for districts that must borrow against anticipated revenue.

Descriptors: Financial Services, Investment, Money Management, School Districts, Validated Programs.

Description: The program was developed in 1973 to provide an efficient and effective way of investing district funds borrowed against anticipated income and of keeping these funds working until they are needed for day-to-day operation.

(The schedule for collecting the taxes from which the district receives most of its revenue makes it necessary for the district to borrow money annually in anticipation of tax income.)

Each fiscal year, the district solicits bids from local banks for the purchase of tax anticipation notes and for management of the district's investments. The bidder with the lowest proposed interest rate for anticipation notes and the highest proposed interest rate for projected investments (defined as the bank's minimum rate of interest payable on investments) is selected. After the bank has purchased the notes, the district invests in the bank all funds not immediately needed for district operation. The bank then manages an investment program in which district funds are deposited in interest-bearing accounts at all times.

All investment is handled by the bank. The responsibilities of the district business manager are to determine the amount of money needed for operation, to obtain appropriate legal counsel, to solicit bids, to advise the school board on selection, and to monitor the program.

Evidence of Success

- **effectiveness:** Since initiation of the practice, the district has realized a significant increase in interest revenue on all available funds with a minimal amount of administrative effort as compared to previous years, when the district had no investment program. Interest revenue has continued to increase each year. School officials say that the practice has enabled them to operate the district with a smaller property tax levy than would otherwise be required.

- **efficiency:** While producing additional revenue for the district, the practice requires only three days of administration time and approximately 24 days of office personnel time each fiscal year, since the bank manages the investment program.

- **exportability:** This program is of potential benefit to any district that must borrow funds annually. Legal counsel should be obtained, however, because requirements vary from state to state. (In Illinois, for example, a district must demonstrate a need for revenues that correlates

with the amount of anticipation notes.)

- **cost requirements:** A small expenditure was required to initiate this program in the Urbana School District because no investment program had been used previously, but there ordinarily would be no start-up costs for districts in which this program replaced an existing practice. Operational cost is approximately \$2,000 for 12 months.

CONTACT: Jack J. Watts, Business Manager/Urbana School District 116/1201 S. Vine St./Urbana, IL 61801/(217) 384-3642.

VALIDATION DATE: 7-80

Descriptors: Data Processing, Financial Services, Grants, Management Systems, School Districts, Validated Programs.

Description: Microcomputer-Assisted Grants Management was developed to increase the capacity of the Seattle School District's Grants Management Office to process information related to its categorically funded programs.

The new system uses a microcomputer and dot matrix printer. Database management programs designed to generate reports and maintain the files of pertinent variables are stored along with the files themselves in two magnetic discs. The district's grants manager has been trained to operate the equipment and use the menu-oriented computer programs.

The system is also appropriate for application to other district functions—such as budgeting, accounting, research, planning, evaluation, and personnel management—at relatively little cost once the basic training and equipment have been provided.

Evidence of Success

- **effectiveness:** In its first year of operation, the system has demonstrated a more rapid turn-around time between receipt of requests for

grant information and provision of such information, as well as reduction in computational errors, more prompt and accurate submission of grant applications and required financial and performance reports, and overall improvement in the management of grants acquisition and maintenance in the district, when compared to the previously used manual system.

- **efficiency:** The system has reduced the amount of time and money spent processing grants management information with no increase in staff.

- **exportability:** The equipment

required is readily available, low in cost, and easy to use. No more than 10 hours of user training is required.

- **cost requirements:** Operational cost per year is approximately \$1,030; a maintenance contract is the main expense. Necessary equipment and computer programs can be purchased for \$7,500 (1980 prices).

CONTACT: Jay Iman, Grants Manager/Seattle Public Schools/815 Fourth Avenue North/Seattle, WA 98109/(206) 587-5107.

SBS VALIDATION DATE: 8/80

The purpose of publishing these Validated Sharing Business Success Practices is to familiarize school administrators with school business practices that have been determined to be effective, efficient and exportable, and to encourage school personnel to consider their adoption. The school business practices described have been in operation for several years. Following data collection and evaluation by the school district, a team of trained experts, using the Sharing Business Success Validation Handbook, reviewed evidence on-site to validate all claims of effectiveness, efficiency and exportability.

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About ASBO And Its Purpose

THE Association of School Business Officials of the United States and Canada, an international professional educational management-oriented organization, is the oldest and largest association in North America devoted exclusively to the improvement and advancement of school business management, public and private.

Founded in 1910 through the auspices of the U.S. Office of Education, ASBO is dedicated to researching, analyzing and publicizing improved methods of school business management in more than 22 specialties. ASBO's membership of about 5,700 active members is from all 50 states, 10 provinces of Canada and overseas.

An integral part of ASBO is its "Research Corporation," a publishing/research subsidiary devoted to advancing educational management at all levels by conducting and promoting significant research programs in all facets of school business management. Twenty-two research committees, staffed with several hundred "expert" generalists and specialists continually confront the biggest issues facing educators.

Statement of Purpose

The Association of School Business Officials of the United States and Canada is a nonprofit, educational organization dedicated to researching, determining and publicizing better methods of school business administration.

ASBO has as its concern the improvement of efficiency in school business management.

In today's highly competitive world, the demands made on the school business official's time and skill are increasing. At a time when school business operations have reached an unparalleled degree of complexity and the maintenance of efficiency and service has become a major problem, school business officials are being asked to perform their jobs with even greater precision and effectiveness.

In this environment, the Association of School Business Officials has an obligation to aid the modern school business official in the performance of his duties and responsibilities. ASBO does this bringing to the attention of its members new and accurate management methods, tools, techniques and procedures that will enable them to better perform their management functions of planning, organizing, coordinating, controlling, evaluating, improving—AND the wise expenditure of the taxpayer's money with which they have been entrusted.

This is accomplished through the ASBO educational program of workshops, conferences, discussion groups, annual meetings, and a far reaching publications program. It also includes the encouragement of courses and programs in the field by recognized and accredited colleges and universities, the sponsoring of research projects and the encouragement of other research projects in the field.

ASBO's monthly journal, SCHOOL BUSINESS AFFAIRS and its ASBO ACCENTS NEWSLETTER are publications representative of the ASBO educational program—"of school business management, by school business officials, for the improvement of school business administration." ■